ABTA
The Travel Association

HOLIDAY HABITS 2024-25

FOREWORD

ABTA's Holiday Habits 2024-25 report finds travel remains as important as ever to the UK public.

However, this thirst for travel comes at a time of change and uncertainty for consumers.

The political landscape is shifting, nationally and globally. In the UK we have a new government and, in the USA, a new President will be taking up office in the White House. Additionally, numerous countries are experiencing appalling conflict, some of which has been escalating in recent months.

Domestically, while inflation has stabilised, day-to-day costs still remain high for many.

When taking this all into account, you'd be forgiven for assuming that the picture could be quite bleak when it comes to holiday taking. But as this report shows that's not the case – those people who travelled this year (84%) took more holidays than previous years, with young families proving to be the most prolific travellers.

In fact, the sector has a level of consumer confidence that bucks the wider trend, with our Travel Confidence Index showing that confidence to travel has increased since last year.

This confidence can be attributed in part to the organised travel sector, with those who booked a package holiday or with a travel professional the most confident.

We've also seen a rise in the number of people booking with travel professionals (38%) for holidays abroad, many doing so in order to have someone to help and support if something goes wrong.

That's perhaps no surprise given some of the operational challenges that have affected travel in recent years; the air traffic control outage at the end of summer 2023, wildfires and a global IT problem this year, for example. Through these incidents, travel agents and operators played an important role supporting customers.

Our research also finds that people continue to have expectations of their travel business to offer more sustainable holidays and help customers make more sustainable choices. As an industry we are tackling sustainability issues relating to holidays – from the impact in destinations to decarbonisation in the sector and restoring nature. It's only by working in collaboration that we will achieve the progress needed, while at the same time ensuring holidays remain affordable.

For this year's research we also explored what holidays mean to people. The top reasons given as to why holidays are important are being able to relax, spending time with family and friends, and supporting mental health. Our members are here to help people achieve all this and more, by offering holidays with the confidence and peace of mind of the ABTA badge.

Mark Tanzer
CHIEF EXECUTIVE

ABOUT THE RESEARCH

This report is based on research with a nationally representative sample of 2,000 UK adults and was carried out from 24 July to 2 August 2024. It looks at people's holiday habits in the 12 months prior to then and what their travel plans are for the year ahead.

Any references to 'the last year' or 'the past 12 months' refer to August 2023 to July 2024, with 'next year' referring to the 12 months from August 2024.

This is an annual piece of research, which has been conducted each summer since 2010 by The Nursery Research and Planning (www.the-nursery.net) on behalf of ABTA.

SECTION 1

HOLIDAYS OVER THE PAST 12 MONTHS

Holidays over the past 12 months

HOLIDAY DEMAND

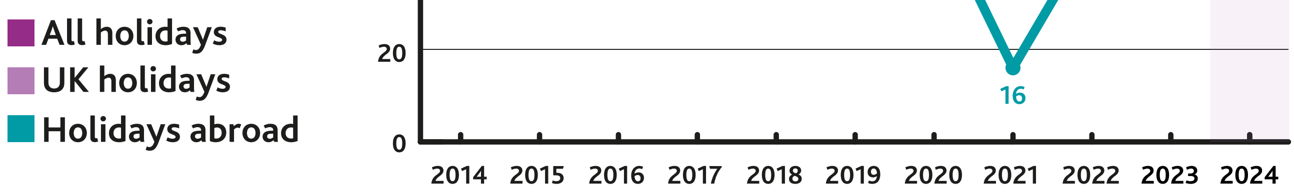
The number of holidays taken this past year has grown quite significantly compared with the year before, but the proportion of people taking them has remained relatively the same.

On average, people went on 3.9 holidays per person in the past 12 months, up on the 3.4 holidays taken the year before and in line with the highest level over the last ten years, in 2019. This breaks down to 1.7 holidays abroad per person (up from 1.4) and 2.2 UK breaks per person (up from 2.0).

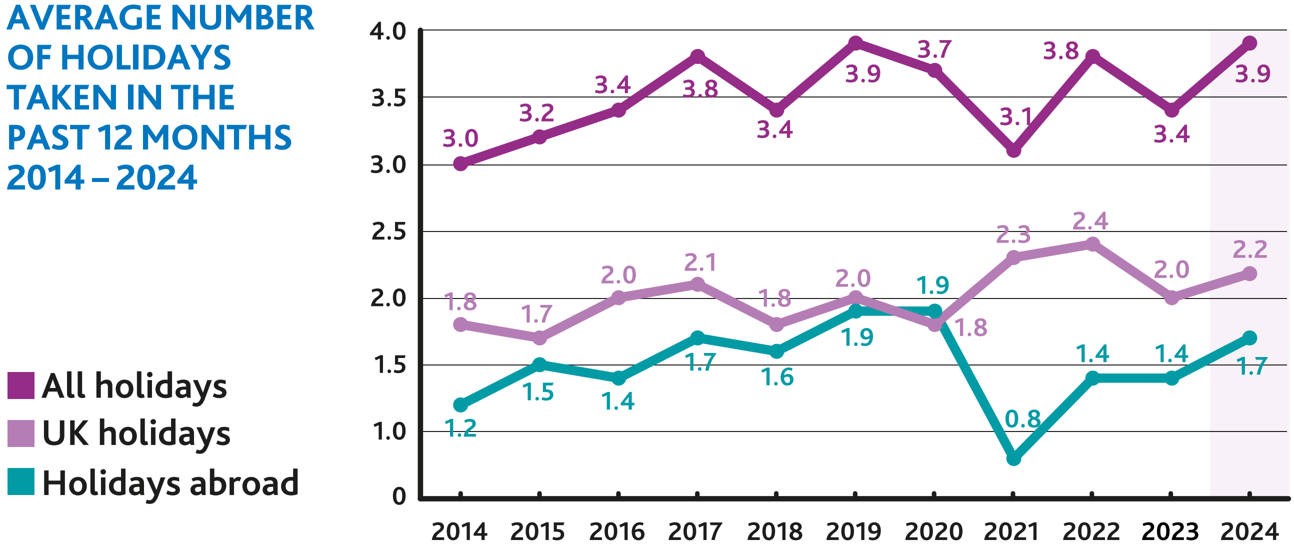
However, the proportion of people travelling remains the same as last year (84%), with a slight year-on-year increase in people going abroad (53%, up from 52%) and a small decrease in people taking a UK break (65%, down from 68%).

This suggests that the overall demand for holidays has been strong over the past 12 months, but is coming from a group of 'habitual holidaymakers' who are travelling even more often than before.

PERCENTAGE OF PEOPLE TAKING HOLIDAYS IN THE PAST 12 MONTHS 2014 – 2024



AVERAGE NUMBER OF HOLIDAYS TAKEN IN THE PAST 12 MONTHS 2014 – 2024



The 2020 data in these charts covers August 2019 to July 2020, so only around six months of travel took place before the emergence of COVID-19.

Holidays over the past 12 months

WHO TRAVELLED

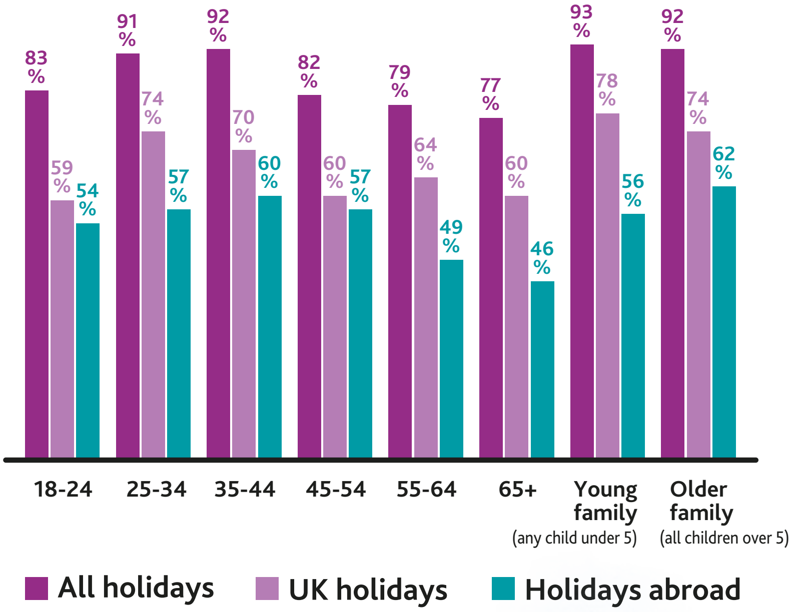
Families[1] continue to go on holiday more than any other age group or life stage[2], with those with older children travelling abroad in greater numbers than those with younger children over the past 12 months (62% vs 56%).

Families are also going on more trips than others, this time with young families leading the charge. They went away 6.5 times, taking more holidays than anyone else and up on the 5.3 trips they took in total the year before. Families with older children also went on a high number of holidays; 5.3 overall and up on the 4.0 trips they took in total the year before.

Among the different age groups there have been some notable year-on-year changes. Those aged 45-54 travelled abroad in much greater numbers than the year before (up from 47% to 57%), as did 35-44-year-olds (up from 55% to 60%), while the over 65s saw a dip in overseas travellers (down from 49% to 46%) as did 18-24-year-olds (down from 60% to 54%).

This data covers a two-year period of immense change and uncertainty, from passenger levels recovering from a global pandemic to a volatile cost of living situation, which varying age groups have responded to in different ways. It seems those aged 35-54 were perhaps a bit more cautious about travelling in the initial post-pandemic period and are now making up for lost time, while the opposite was true for the youngest and oldest age groups in our research.

WHO TRAVELLED ON A HOLIDAY IN THE PAST 12 MONTHS



AVERAGE NUMBER OF HOLIDAYS TAKEN PER PERSON IN THE PAST 12 MONTHS BY LIFE STAGE

Average	3.9	2.2	1.7
Under 45 (no kids at home)	4.0	2.3	1.7
Younger family (any child under 5)	6.5	3.7	2.8
Older family (all children over 5)	5.3	3.0	2.3
Over 45 (no kids at home)	2.8	1.6	1.2

[1] 'Families' refers to all survey respondents living in a household with at least one child aged 15 or under. 'Young families' or 'families with young children' refers to all survey respondents living in a household with at least one child aged five or under. 'Older families' or 'families with older children' refers to all survey respondents living in a household where all children are aged 6-15 years old.
[2] The four 'life stages' covered in our survey are Under 45s (with no children aged 0-15 at home), Young Families (with at least one child aged five or under at home), Older Families (all children at home are aged 6-15 years old) and Over 45s (with no children aged 0-15 at home).

Holidays over the past 12 months

WHERE PEOPLE WENT

Europe was overwhelmingly the top choice for UK holidaymakers heading overseas, with four out of five (83%) travellers enjoying a break there over the last 12 months. Europe's dominance is reflected in the top 15 countries that people visited, where Spain was once again the nation's favourite.

While there has been little change in the top nine countries visited, with just Germany and Portugal swapping places, there has been more movement in the second half of the list, with the UAE moving up two places to the 10th most popular country (a particular favourite for 18-24-year-olds, with 12% visiting in the last 12 months), plus Mexico, Austria, Malta and Croatia all proving more popular than last year.

A new word to enter vocabularies this year has been 'coolcations' as some people speculate whether high temperatures are leading people to seek out cooler holiday destinations. Our data suggests that isn't the case; the destinations on the UK's most-visited list offer an abundance of options for warm, sunny holidays, leading us to believe coolcations are the exception rather than the rule.

TOP COUNTRIES VISITED IN THE PAST 12 MONTHS (DIFFERENCE IN RANKING COMPARED TO 2023)

31% =
1. Spain

22% =
2. France

17% =
3. Italy

15% =
4. USA

13% =
5. Greece

6.Portugal – 11%
+1 place

7.Germany – 11%
-1 place

8.Turkey – 10%
=

9.Netherlands – 8%
=

10.UAE – 6%
+2 places

11.Mexico – 6%
+3 places

12.Austria – 6%
+1 place

13.Australia – 5%
-2 places

14.Malta – 5%
+6 places

15.Croatia – 5%
+1 place

Base: respondents who took a holiday in the past 12 months

Holidays over the past 12 months

TYPES OF HOLIDAYS TAKEN

We took a different approach to looking at holiday types in this year's research, separating out accommodation type – for example, all-inclusives and renting a private home – from trip type.

This year's results show that beach holidays and city breaks remain the two most popular types of holiday, with almost half (48%) heading to the beach in the past 12 months, rising to 56% of families. More than a quarter (27%) of people went on a countryside break, a style most popular with those aged 55+, with 32% of them taking one in the past 12 months.

Around one in eight travellers (12%) went on an adventure holiday in the past 12 months, rising to 29% of 18-24-year-olds and 25% of those aged 25-34, putting this type of trip on a par with cruise in terms of popularity. These groups were also twice as likely to have gone on safari (both groups at 8%) and a winter sports break (8% of 25-34 and 7% of 18-24) than the average traveller.

FAVOURITE TYPES OF TRIP IN THE PAST 12 MONTHS

48% Beach holiday

43% City break

27% Countryside break

15% Multi-destination trip

13% Lakes and mountains

12% Adventure holiday

12% Cruise

7% Wellbeing break

Motorhome / camping trip	5%
Train holiday / interrailing	5%
A coach holiday	5%
Safari	4%
Winter sport (skiing / snowboarding)	3%

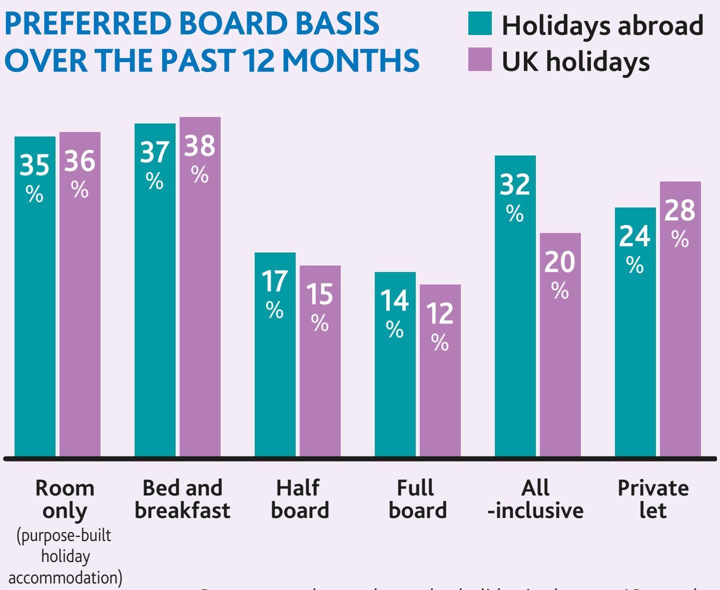
Base: respondents who took a holiday in the past 12 months

SPOTLIGHT ON ALL-INCLUSIVE

Looking at the board basis people chose over the past 12 months, similar numbers of people opted for bed and breakfast (37%), room only (35%) and all-inclusive (32%) when travelling abroad. However, all-inclusive was the number one board basis for older families (chosen by 44%) and a clear second favourite for those aged 18-24 (34%) – behind room only (47%), but ahead of private holiday lets (24%).

Overall, staying in a private holiday let was the fourth most popular choice for holidays abroad (chosen by 24% of holidaymakers), and was a more popular choice for stays in the UK (28%).

PREFERRED BOARD BASIS OVER THE PAST 12 MONTHS



Base: respondents who took a holiday in the past 12 months

FAMILIES GOING CRAZY FOR CRUISE

Our research suggests that the popularity of cruises is growing among holidaymakers with children, with the proportion going on cruises almost doubling over the past five years. In 2019, 8% of them said they went on a cruise in the previous 12 months compared with 15% in this year's survey. Their interest in cruise holidays is also set to grow in the year ahead, with 17% planning to go on a cruise in the next 12 months, compared with 14% on average.

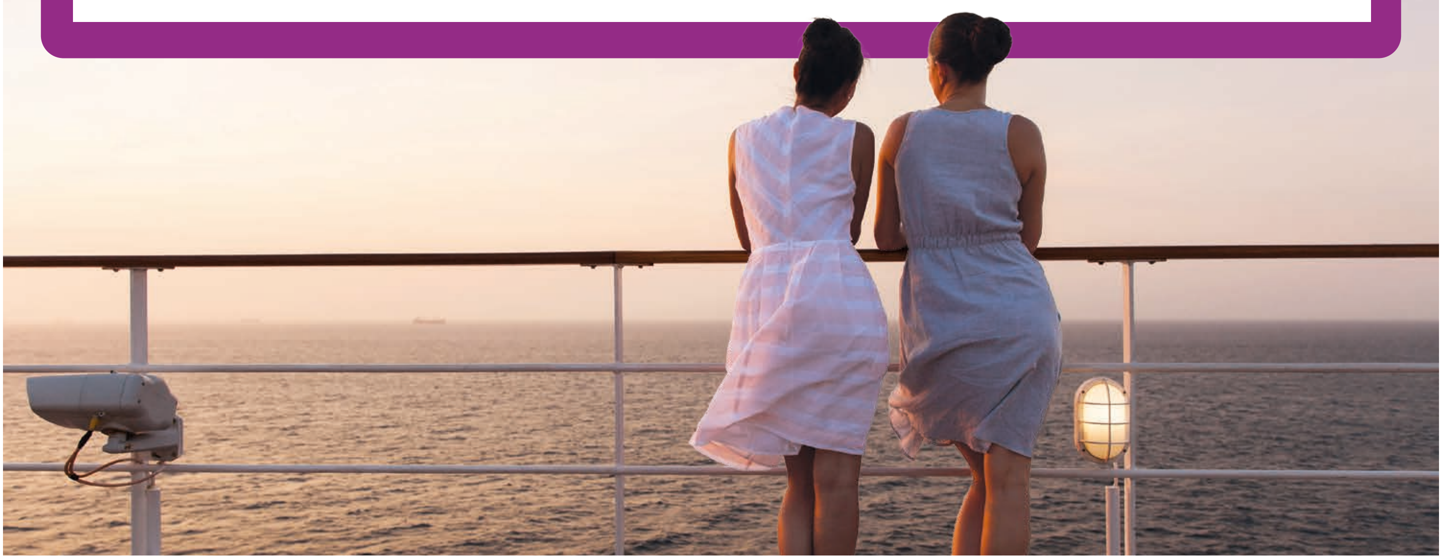
As people with children are increasingly cruising, their preferences are leading to shifts in overall preferred cruise types and lengths. While more than half of cruise-goers (55%) cited ocean cruises as their favourite option, followed by adult-only (37%) and cruises around the UK (34%), those with children favoured cruises around the UK (51%) above all other options, followed by wellness (44%), then ocean (42%). This preference for staying closer to home means they're much more interested in shorter trip durations than the average cruiser with, for example, 24% interested in taking a weekend cruise compared with 13% on average.

When asking those with children what appeals to them the most about cruise holidays, the chance to meet like-minded people (cited by 49%) was seen as considerably more important than the average (31%). Value for money was especially relevant to families with young children, cited by 56% of them compared with 48% on average.

WHAT ATTRACTS PEOPLE TO A CRUISE

	Average	Families (any child under 16)
The opportunity to visit multiple destinations in one trip	63%	52%
The convenience of having meals, accommodation, transport and entertainment all in one place	50%	44%
Value for money	48%	48%
A safe and secure travel experience	47%	48%
The variety of onboard activities and entertainment options	42%	47%

Base: respondents who took a cruise in the past 12 months and/or are planning to take a cruise in the next 12 months



SECTION 2

BOOKING HABITS

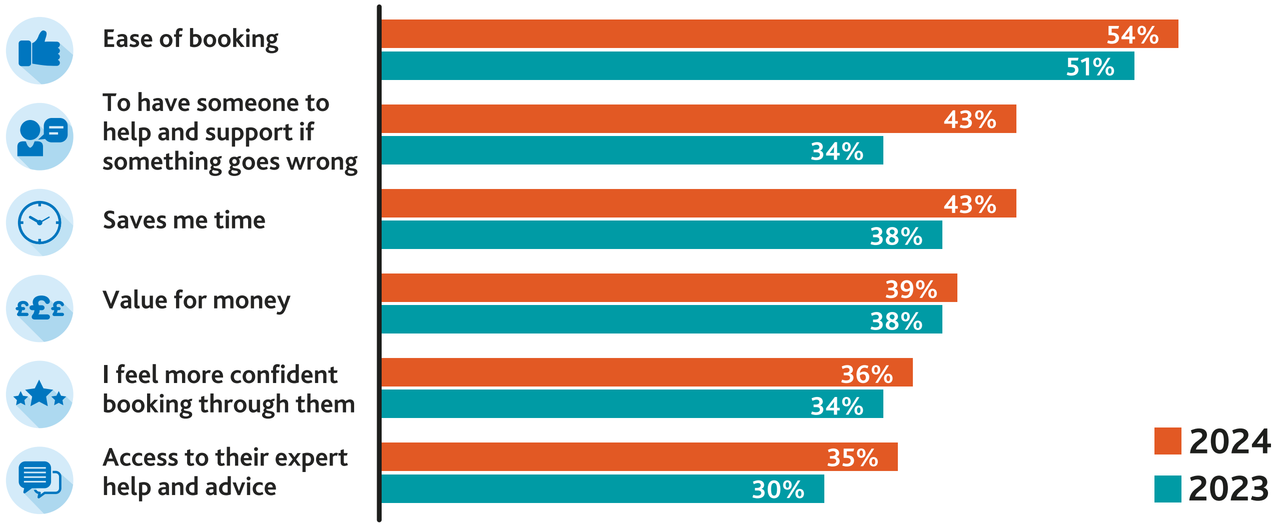
TRAVEL PROFESSIONALS AND PACKAGES INCREASE IN POPULARITY

The proportion of people saying they booked a holiday with a travel professional[3] in the past 12 months has risen to 38%, up from 34% last year.

The ease of booking in this way is cited as the number one benefit, but there has also been a significant rise in people wanting the reassurance that someone is there to help them if something goes wrong (43% up from 34%). This could be due to the varied, high-profile challenges that holidaymakers have faced in the past year or so – from wildfires to a UK air traffic control issue – where they've appreciated the value of having an expert in their corner to help them.

Young families and younger age groups are increasingly turning to travel professionals to book their holidays; a trend which has been steadily building over the past five years. In 2019, 36% of families with young children said they booked a holiday with a travel professional, which rose to 55% this year, while the proportion of 18-24-year-olds booking with travel professionals has risen from 36% in 2019 to almost half (48%) this year.

TOP REASONS FOR BOOKING WITH A TRAVEL PROFESSIONAL



[3]We define 'travel professionals' as individuals with expertise, knowledge, and experience in travel and in booking travel arrangements, such as travel agents or staff of holiday providers/tour operators.

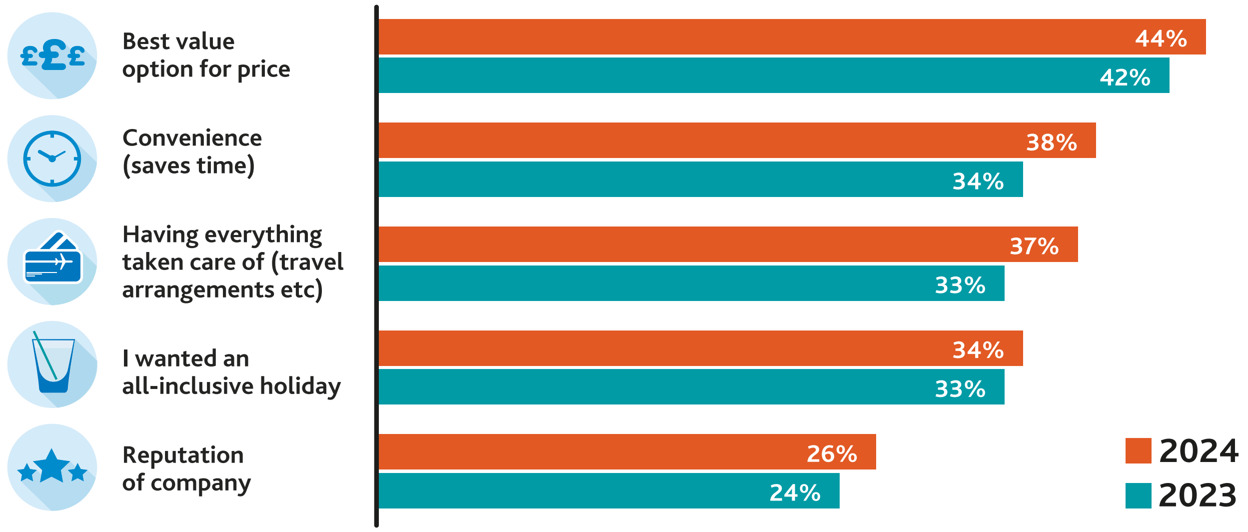
PACKAGE HOLIDAYS

Quick, easy and cost-effective, package holidays continue to be the most popular way to travel overseas, booked by 62% of people who travelled abroad in the past 12 months (61% last year), rising to 77% of families (up from 74%) and 71% of 18-24-year-olds (up from 65%).

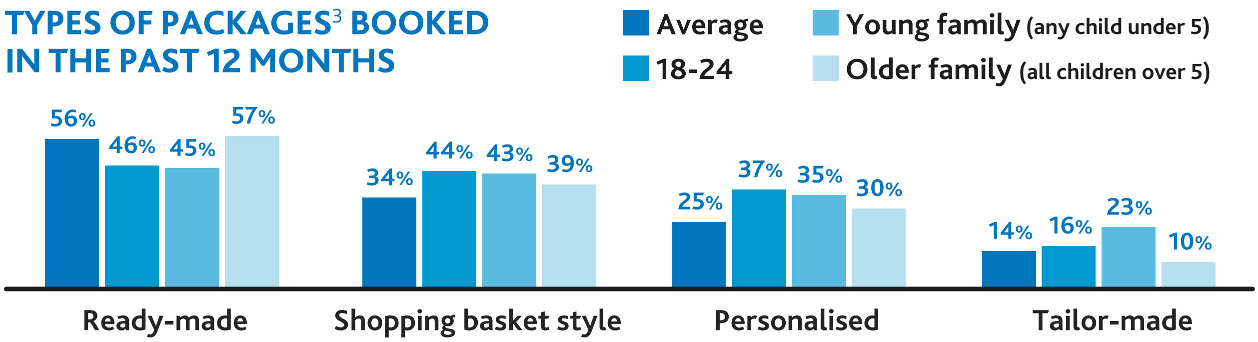
There has been a slight uplift in people saying they booked a package because it was the best value option for the price (from 42% to 44%), with more people also appreciating the time they save by booking a package (up from 34% to 38%) and the fact that everything is taken care of (up from 33% to 37%).

The number one type of package was a ready-made one, which has become increasingly popular compared with last year (up from 51% to 56%). And within the family market, while older families had a stronger preference for ready-made trips than their younger counterparts, young families were more than twice as likely to tailor their package than those with older children.

TOP REASONS FOR BOOKING A PACKAGE



TYPES OF PACKAGES[3] BOOKED IN THE PAST 12 MONTHS



[4]Ready-made = with no changes to the flight times/accommodation choice offered. Shopping basket = where you select your flights, accommodation and any other extras then pay one price for the trip. Personalised = where you make tweaks/additions to the holiday like upgrading flights or choosing a specific hotel room. Tailormade = where the holiday is created entirely around your requirements.

SECTION 3

IMPORTANCE OF HOLIDAYS

Importance of holidays

A MULTI-GENERATIONAL APPEAL

New for this year, we have captured why people go on holiday and analysed how this differs across different generations[5] – from Gen Z to the Silent Generation.

For Gen X, Baby Boomers and the Silent Generation, the opportunity to relax was by far their number one reason for going on holiday, followed by the chance to spend quality time with family and/or friends, while Gen Z and Millennials say they are equal in importance. The mental health benefits of going away were identified by more than half of Gen Z, Millennials and Gen X respondents, and recognised by a sizeable number of Baby Boomers (44%) and the Silent Generation (26%).

The two older generations shared with Gen Z the appeal of meeting new people on holiday – cited by one in five people in these generational groups, while roughly one in eight people across all generations saw holidays as an opportunity to pursue a personal interest or hobby.

WHY HOLIDAYS ARE IMPORTANT

Differences by generation (ranking for each generation in brackets)

	Average	Gen Z[4]	Millennials	Gen X	Baby boomers	Silent generation
1. To relax	73%	64% (2)	70% (1)	77% (1)	76% (1)	77% (1)
2. To spend quality time with family and/or friends	63%	65% (1)	69% (2)	62% (2)	57% (2)	54% (2)
3. For my mental health and wellbeing	50%	54% (3)	56% (3)	51% (4)	43% (3)	26% (6)
4. To escape the pressures of day-to-day life	46%	50% (4)	53% (4)	52% (3)	33% (6)	30% (5)
5. For cultural experiences	39%	38% (6)	37% (7)	39% (6)	41% (4)	48% (3)
6. To enjoy better weather	38%	35% (7)	38% (6)	39% (5)	38% (5)	33% (4)
7. For adventure and exploration	32%	42% (5)	40% (5)	28% (7)	23% (7)	24% (7)
8. To meet new people	15%	20% (8)	15% (9)	9% (9)	18% (8)	18% (8)
9. To pursue a personal interest or hobby	13%	14% (10)	14% (10)	12% (8)	12% (9)	14% (9)
10. For educational experiences	11%	17% (9)	17% (8)	9% (10)	6% (10)	3% (10)

[5]We define the different generations by the years they were born as follows: The Silent Generation = born 1928-1945, Baby Boomers = born 1946-1964, Gen X = born 1965-1980, Millennials = born 1981-1996, Gen Z = born 1997-2012. As our survey is answered by people aged 18+, our Gen Z data covers respondents born between 1997 and 2006. References to Gen Z should be noted with the caveat that younger Gen Z members were not covered by our research.

Importance of holidays

HOLIDAYS ARE STILL A SPENDING PRIORITY

For the past few years, we've been tracking how rising day-to-day costs have been affecting people's holiday plans. Our data shows a continuing tendency to cut back on other discretionary spending before holidays. In fact, holidays are the last thing to go if people need to reduce their spending to cover the cost of living, with 32% of people saying they would cut back on holidays if they need to save money, compared to 58% of people who said they would cut back on eating out.

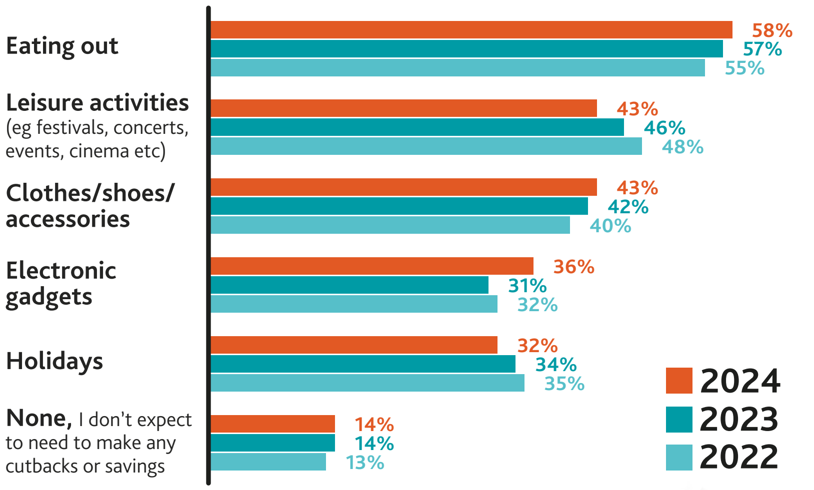
This commitment to holidays is also shown in how much people plan to spend on their holidays next year, with an increasing number planning to spend more (31%, up from 28%) and most people (53%) planning to spend the same.

But our data also shows that holidays aren't unaffected by cost of living challenges. Around one in seven (15%) plan to spend less, of which 44% said it is because of increased day-to-day costs (food, energy etc), and 22% said it was because of rising rent or mortgage payments.

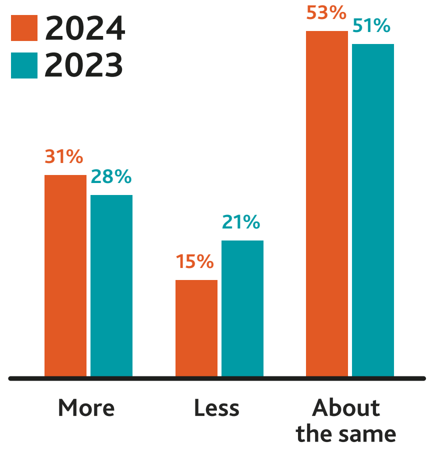
And while the most common reason why people are planning to spend more is because they want to go on more holidays (46%), for just over a third (36%) it is because they expect holidays to be more expensive, reflecting the wider impact that rising prices for items like food and energy has on holidays.

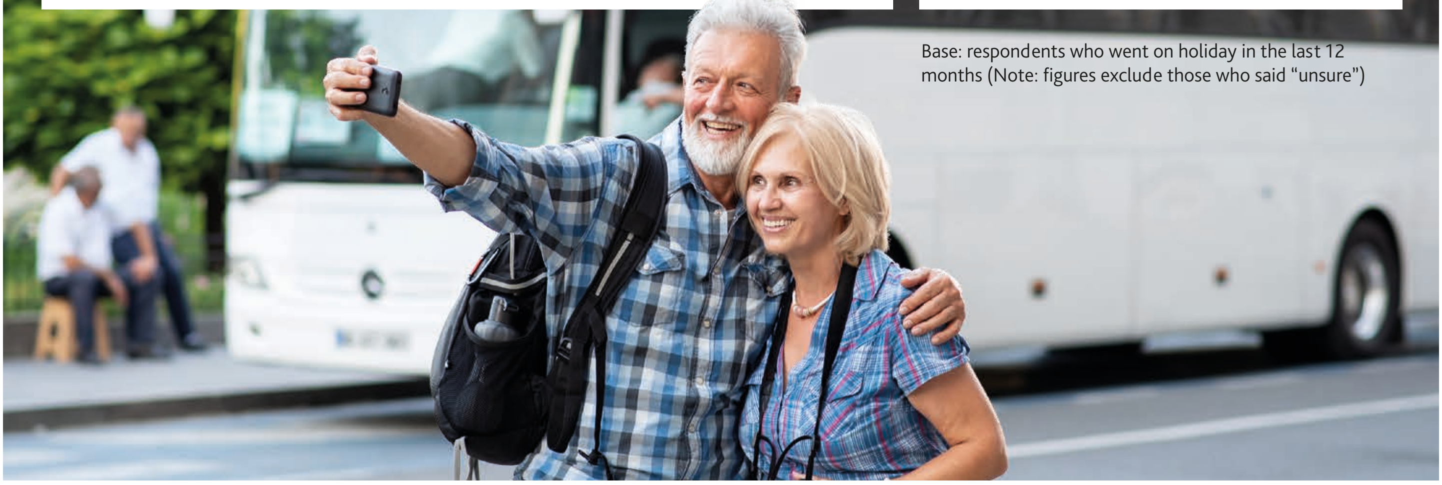
We also see the cost of living having an impact on when people decide to book their holidays. Of those who said they booked later than normal, 25% cited concerns around cost of living as the reason which was the second most common reason, behind thinking they'll get a cheaper/ better price (32%). However, while 22% said the cost of living was the reason they booked earlier than normal it was the sixth reason for doing so, behind cheaper prices/ better deals (44%), availability (40%), better choice (34%), getting the destination they want (30%) and getting time off work (23%).

ACTIVITIES WHERE PEOPLE PLAN TO REDUCE THEIR SPENDING TO COVER THE COST OF LIVING



HOW MUCH PEOPLE PLAN TO SPEND ON THEIR HOLIDAYS NEXT YEAR COMPARED TO THIS YEAR





Base: respondents who went on holiday in the last 12 months (Note: figures exclude those who said "unsure")

THE TRAVEL CONFIDENCE INDEX

Last year, ABTA launched the Travel Confidence Index; a new way of helping the industry understand, at a glance, how confident people are feeling about travelling overseas and why.

The aims are to provide an annual measure of the nation's confidence levels, to track any changes among different age groups or certain types of travellers and to identify the most effective actions that the industry can take each year to collectively build consumer confidence.

THE TRAVEL CONFIDENCE INDEX 2024

With the Travel Confidence Index now in its second year, we have our first opportunity to compare data and start identifying any trends or changes in sentiment.

Last year's results revealed a score of +41 for the UK population overall, with more positive scores, and therefore higher confidence, among certain age groups and types of travellers.

HOW WE CALCULATE THE TRAVEL CONFIDENCE INDEX

Our Travel Confidence Index is calculated by asking a nationally representative sample of 2,000 UK adults to rate how confident they are currently feeling about taking an overseas holiday on a scale of one to 10, with one being not confident at all and 10 being extremely confident.

Excluding those who rate their confidence levels as neutral (five to six out of 10), the scores are calculated by taking away the percentage of those with low confidence levels (one to four) from the percentage of those with high confidence levels (seven to 10).

THIS YEAR'S RESULTS

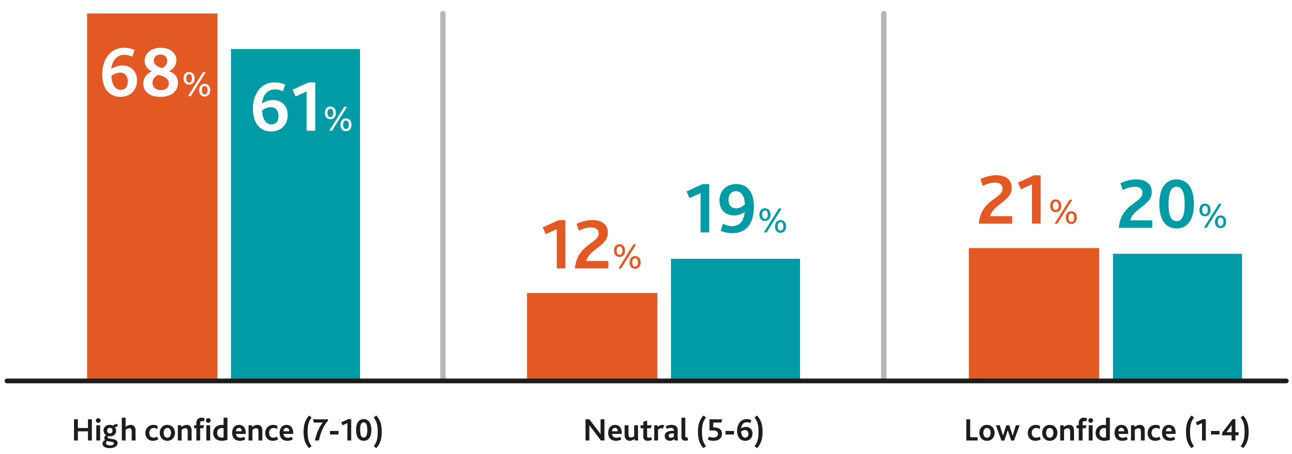
With 68% in the high confidence group and 21% in the low confidence group, this year's Travel Confidence Index stands at +47.

This means that confidence to travel across the UK population – including those travelling regularly, occasionally or not at all – is up by 6 points compared with last year.

This increase is coming from people with previously 'neutral' levels of confidence now rating themselves as having higher confidence to travel, rather than a drop in those having low confidence levels. One in five people (21%) rated themselves as 'extremely confident' this year, up from 17% last year.

This year's Travel Confidence Index stands at: +47

THE TRAVEL CONFIDENCE INDEX[6] 2024 vs 2023



[6]Results may not total 100% due to rounding.

WHAT GIVES PEOPLE CONFIDENCE TO TRAVEL?

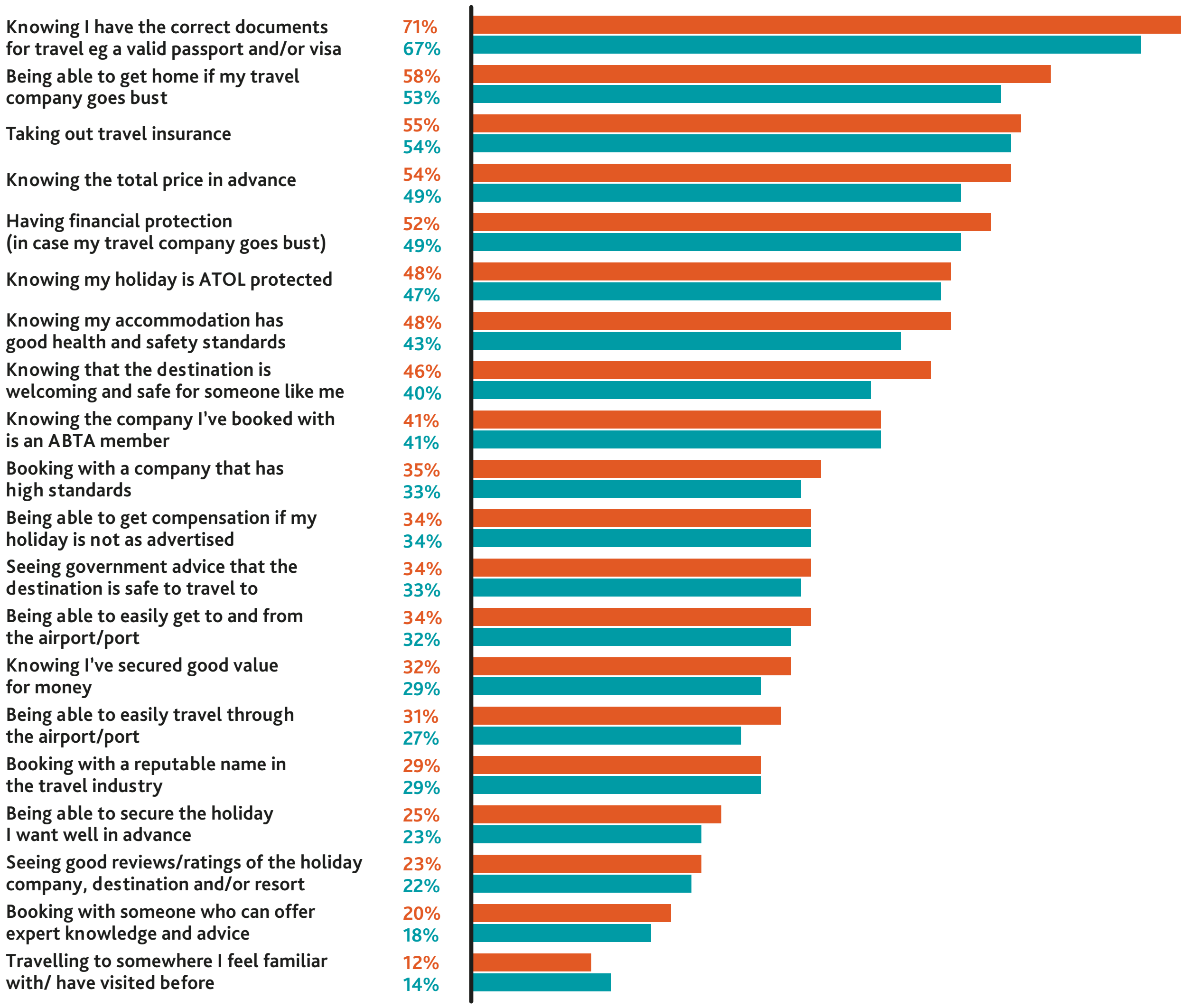
As last year, we provided respondents with a list of potential ‘confidence builders’ and asked them to rank them as ‘essential’, ‘important’, ‘nice to have’ and ‘not important’.

While there were no dramatic year-on-year changes, there are clearly some fundamental areas that travel companies should focus on to provide the greatest levels of confidence for their customers.

Getting the correct documents for travel was rated as the most essential, so it should pay dividends to advise customers if their passports will be valid for travel and help them understand the new requirements around ETIAS in 2025[7]. Taking out travel insurance and having financial protection in case their travel company goes bust were seen as essential by more than half of respondents.

Areas seeing the biggest year-on-year increase were having a welcoming and safe environment on holiday, good health and safety standards at their accommodation, and being able to get home if their travel company goes bust. Reassurance in customer conversations or marketing around these points should help customers feel more confident to travel. Knowing the total price in advance was also seen as more important than last year, illustrating that many continue to face financial pressures.

WHAT GIVES PEOPLE CONFIDENCE TO TRAVEL? – THE ‘ESSENTIALS’ 2024 vs 2023



[7]ETIAS (Electronic Travel Information & Authorisation System) is the new travel authorisation system which the EU is due to introduce in mid-2025. Non-EU residents will need to apply for and be granted an ETIAS before travelling to the EU.

HOW HAVE CONFIDENCE LEVELS CHANGED AMONG DIFFERENT GROUPS OF TRAVELLERS?

There are some significant variations in confidence levels among different travellers, especially among different age groups, and some trends starting to develop.

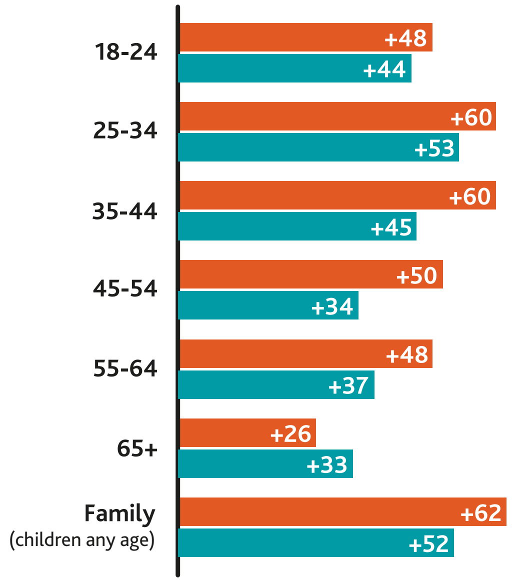
How people booked and travelled continues to have a significant impact on how confident they feel, with those who booked with a travel professional (still at +72) and those who took a package holiday this year (up from +70 to +74) once again among the most confident travellers.

Looking at different age groups and life stages, while families (+62) and 25-34-year-olds (+60) remain the most confident, those aged 64 and under are all feeling more confident to travel this year, with the biggest year-on-year increase in confidence among those aged 45-54 (up from +34 to +50). This age group also travelled abroad in much greater numbers in the last year compared with the year before (up from 47% to 57%), indicating a link between familiarity with travel and confidence to travel.

This is reinforced when we see that the only age group to have lost confidence to travel when compared with last year is those aged 65+, who have a score this year of +26, down from +33. Part of the reason may be that this group travelled abroad in smaller numbers over the past 12 months (46%) than the 12 months prior (49%).

The over 65s also appear to be more risk averse than others. The points bringing them greater levels of confidence than the average traveller were; being able to get home if their travel company goes bust (73% compared to 58% on average), taking out travel insurance (73% compared to 55%), having financial protection in case their travel company goes bust (65% vs 52%), and booking with an ABTA member (59% against an average of 41%).

THE TRAVEL CONFIDENCE INDEX (age breakdown) 2024 vs 2023



Among the most confident to travel are those who took a package holiday this year

+74

SECTION 4

OUTLOOK FOR THE YEAR AHEAD

Outlook for the year ahead

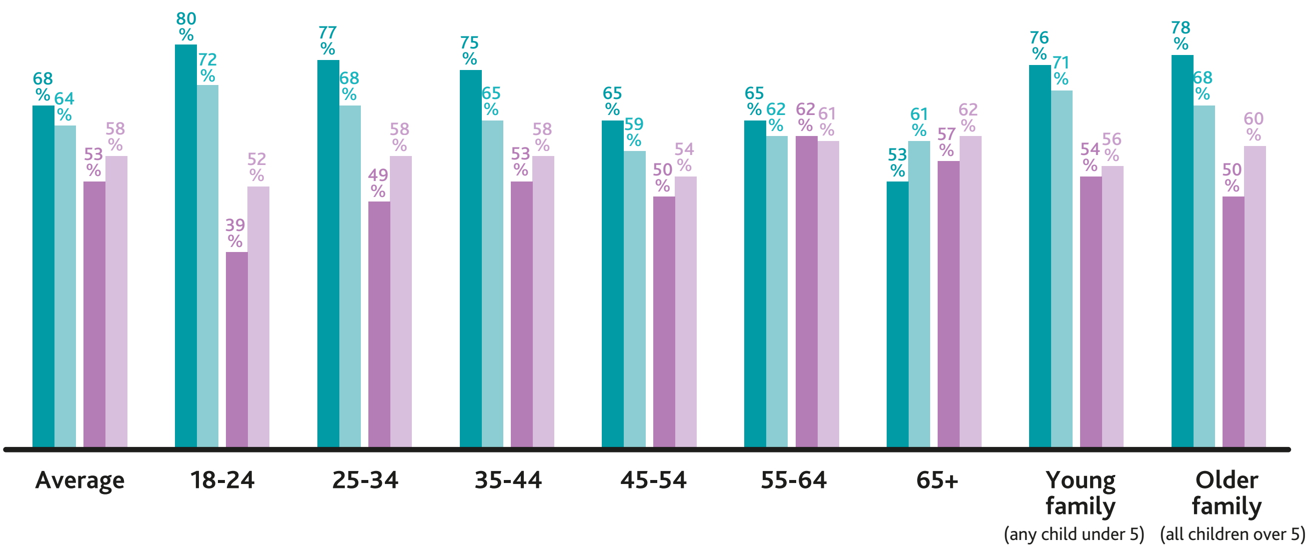
PEOPLE'S PLANS FOR THE YEAR AHEAD

Looking ahead to next year[6], more than two-thirds (68%) of people are planning to travel abroad in the next 12 months (up from 64% last year), while just over half (53%) are planning to take a domestic break (down from 58%). While not all of these plans will become reality, roughly two-fifths are already underway, with 44% of those who intend to travel saying they've already booked or started to book their holiday(s) abroad for the year ahead, with 39% the figure for breaks in the UK.

All age groups say they are planning to travel overseas in greater numbers than last year, except those aged 65+, with families and 18-34-year-olds intending to holiday abroad in the greatest quantities in the next year. Those aged 18-24 are so keen to head overseas that they're twice as likely to be planning to holiday abroad than in the UK.

While the over 65s look set to travel abroad the least, they are the most likely to already have some plans in place, with more than half (51%) of those who said they were planning to travel abroad saying they've already got something booked for the next 12 months.

HOW DIFFERENT AGES AND LIFE STAGES PLAN TO TRAVEL IN THE NEXT 12 MONTHS



[6]Any references to 'next year' or 'the year ahead' refer to the 12 months from August 2024.

Outlook for the year ahead

WHERE PEOPLE PLAN TO GO

Spain maintains its position at the top of the nation's wish list of destinations for the year ahead, while France and the US squeeze past Italy into second and third place.

Might 2025 be a great year for long-haul? In ninth place is Australia, moving up three places since last year and reflecting a general interest in travelling further afield in the year ahead – increasing numbers are planning to visit Asia (11%, up from 9%), Africa (7%, up from 5%), Australasia (6%, up from 4%) and South America (5%, up from 3%).

Our research also shows that 45% of people are likely to visit a country they've never been to before (up from 41% last year), which rises to almost two-thirds (65%) of 25-34-year-olds, so people are feeling more open to trying somewhere new than they have been in recent years.

TOP 15 DESTINATIONS FOR THE YEAR AHEAD (DIFFERENCE IN RANKING COMPARED TO 2023)

1. Spain – 24% =
2. France – 15% +1 place
3. USA – 14% +1 place
4. Italy – 14% -2 places
5. Greece – 11% =

6. Portugal – 9%
=

7. Germany – 6%
=

8. Turkey – 6%
=

9. Australia – 5%
+3 places

10. UAE – 4%
+5 places

11. Croatia – 3%
=

12. Canada – 3%
+2 places

13. Japan – 3%
-3 places

14. Cyprus – 3%
+4 places

15. Thailand – 3%
+2 places

Outlook for the year ahead

WHEN ARE PEOPLE PLANNING TO TRAVEL?

In recent years the industry has seen a shift in when people travel, with people increasingly holidaying throughout the year, as opposed to just the peak summer months. This has been driven by both consumer demand and travel companies extending their programmes – offering more options for when to travel. Through our Holiday Habits research this year and last, we have sought to capture this trend, and it is reflected in the chart below.

Unsurprisingly, those who aren't tied to school holidays are more likely to travel throughout the year, with the under 45s (with no children at home) and young families (with children of pre-school age), planning to travel in similar numbers across the seasons.

The most popular month for young families intending to travel is December (27%), when many may have a special trip planned to celebrate the Christmas festivities. As you would expect, summer months are the most popular for older families, with 23% looking to holiday in August followed by 20% in July. Both groups without children at home favour September as their month to get away, most likely taking advantage of some late summer sun in a quieter month to travel.

WHEN PEOPLE ARE PLANNING TO TRAVEL ABROAD IN THE NEXT YEAR

	2024				2025							
	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG
Average*	**23%**	**17%**	**15%**	**16%**	**9%**	**11%**	**12%**	**13%**	**17%**	**15%**	**15%**	**16%**
Under 45 (no kids at home)	19%	13%	14%	17%	9%	10%	12%	13%	15%	16%	19%	18%
Young family (any child under 5)	10%	14%	18%	27%	9%	12%	9%	14%	15%	14%	16%	24%
Older family (all children over 5)	18%	16%	13%	18%	8%	8%	9%	12%	12%	13%	20%	23%
Over 45 (no kids at home)	31%	16%	13%	18%	8%	8%	9%	12%	12%	13%	20%	23%

*While the data does show that people intend to travel throughout the year, there is a word of caution on the proportion of people intending to travel each month. Given that our survey was carried out in July, people are more likely to select the months that are closer to when the survey was carried out, as they will more likely have concrete plans for nearer in the future. We see that in the data for September 2024 and, while the industry has reported that this has been a strong month for travel, it is too early to say that it will be the most popular month to travel in this 12-month period given many holiday plans for next year are still to be considered.

SECTION 5

CONSUMERS AND RESPONSIBLE TRAVEL

CONSUMERS AND RESPONSIBLE TRAVEL

Travelling in a more sustainable way is firmly on the agenda for both businesses and consumers. It sits at the heart of many corporate plans and strategies, as travel companies recognise that tourism is a force for good, but with it come challenges that need to be addressed including the changing climate. Many consumers have the expectation that business should manage the impact of their holiday for them, but a large proportion also want to take action themselves.

42% I would like advice from my travel company about how I can make better choices for the environment and local people

38% It is the travel company's responsibility to manage the impact my holiday has on the environment and local people – not mine

The top concerns consumers have when it comes to the impact of their holidays remain pretty consistent with previous years. Animal welfare sits in joint first place, alongside preservation of culture and heritage, and waste and plastic pollution.

It's clear from our data that the things the public is most concerned about are what is happening in destination, with nature and the natural environment a strong theme.

In some popular destinations this past year we have seen additional tourism measures introduced, such as day charges and increases in sustainability taxes, as well as residents protesting about the tourism model and its impact on where they live.

However, while conversations about overtourism are very much on the radar of the travel trade and national media, our data suggests the events of the last year have done little so far to lead to an increase in consumers' concerns. While the numbers aren't insignificant it's only preservation of culture and heritage where an increase has been seen (up 2% on last year), yet there have been slight decreases for other indicators (impact on local people and overtourism).

TOP CONCERNS ABOUT THE IMPACT OF HOLIDAYS

1	Preservation of culture and heritage	66%	2023 64%
1	Waste and plastic pollution	66%	2023 66%
1	The welfare of animals in tourism	66%	2023 68%
2	Nature conservation	63%	2023 63%
3	The impact of over-tourism	57%	2023 59%
3	How local people are impacted by tourism	57%	2023 58%
4	The impact of climate change	56%	2023 58%
5	Water stress	53%	2023 53%

Base: All respondents

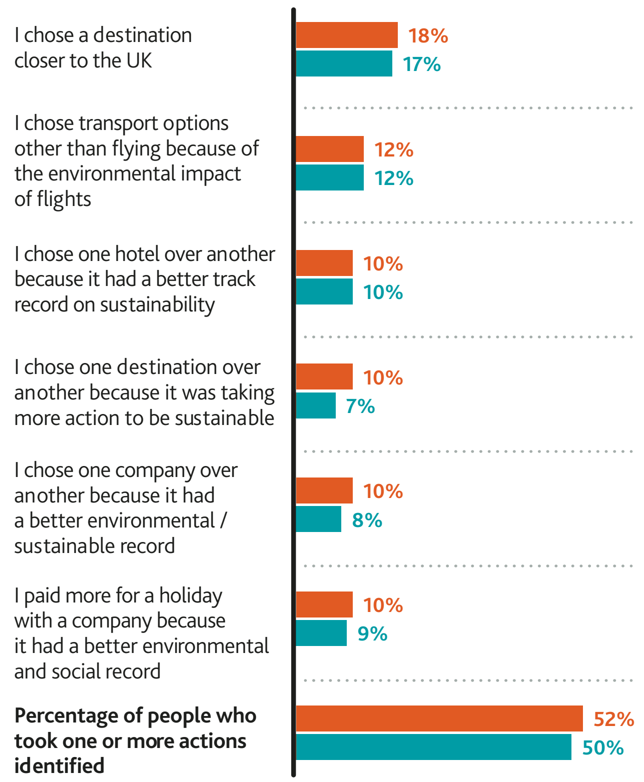
CONSUMERS AND RESPONSIBLE TRAVEL

As well as having expectations of travel businesses, consumers are also looking to make their own responsible choices, to help mitigate the impact of their travels.

There was a slight increase in people saying that, when planning and booking their holiday, they had made one or more choices with environmental implications in mind; 52% this year, up from 50% in 2024. While there still remains a gap between people's intentions and what they go on to do, what we have seen is a marginal increase across the board in the actions they took. As this is only the second year of data on this area, it is too early to tell whether this is the start of a trend, albeit a slow growing one.

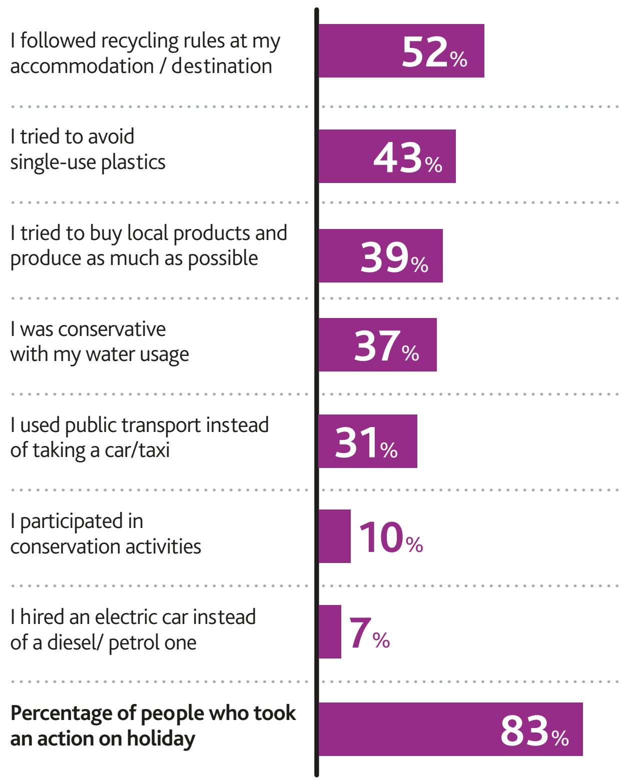
For the first time, we used this survey to establish what actions people might have taken when on holiday, not just when planning their trip. Five out of six (83%) people said they did one or more things while away to make their holiday more sustainable. From the findings, it seems that not only are we packing our flip flops and suncream when heading off on our travels, we're taking our recycling habits too. More than half (52%) of people said that they followed the recycling rules at their accommodation/destination – the most common sustainability action taken on holiday.

ACTIONS PEOPLE TOOK WHILE PLANNING A HOLIDAY 2024 vs 2023



Base: respondents who took a holiday in the 12 months prior

ACTIONS PEOPLE TOOK WHEN ON HOLIDAY



While the specific numbers of people who are concerned about specific issues has fluctuated a little over the last five years, the numbers remain significant.

There are many ways the industry is already taking action including addressing environmental impact, helping communities benefit from tourism and managing waste responsibly. And many are helping people make more responsible choices, both when planning their trips and when on holiday. To meet consumer expectations, this approach must continue.

CONSUMER VIEWS OF ABTA*

80% **of consumers associate ABTA with confidence**

81% of consumers associate **ABTA** with being **reassuring**

80% of consumers associate **ABTA** with being **reliable**

84% of consumers associate **ABTA** with being **safe**

82% of consumers associate **ABTA** with being **experts**

THE POWER OF THE ABTA BRAND*

72% **recommend booking with an ABTA member to their friends and family**

68% of consumers only **trust companies** that are members of **ABTA**

47% are willing to **pay more** for a holiday booked through an **ABTA** member

ABOUT ABTA

ABTA is a trade association for UK travel agents, tour operators and the wider travel industry. We're the largest travel trade body, with over 4,300 travel brands in membership who have a combined annual UK turnover of over £40 billion. We work closely with our members to help raise and maintain standards and build a more sustainable travel industry, and provide travellers with advice, guidance and support.

Our members sign up to a code of conduct and commit to agreed service standards and fair trading. When you need clear travel information, and accurate and impartial advice relating to your trip, we're here for you. When you book with an ABTA member, reliable advice comes as standard. This means that booking with our members brings peace of mind.

ABTA also offers services to help you on your travels – ABTA Travel Insurance and ABTA Travel Money.

All this together means we help you travel with confidence.

*Research by The Nursery Research and Planning (www.the-nursery.net) of a nationally representative sample of 1,000 UK adults in March 2024.